Employees List

Employees are individuals who work for your company, and may or may not be a person who will be using Managely.

If a user has been set up, you can link the employee to the saved user to auto-fill several of the data entry fields. An employee record contains fields to track additional information that is not available on the user record.

When accessing employees from the Company Setup menu, a list of all active employees is displayed. If the employee has been marked as a Technician or Salesperson (or both) on their employee record, the Yes/No button in the Technician and Salesperson columns indicate this.

From the Employee List, you may perform the following actions:

- Add new employees
- Edit or delete existing employees

Employees List Tools

There are several tools available to manage the Employees List.

- Export to Excel
- Filter by active or inactive employees
- Open the menu (to the right of the column name) to hide/ show columns, or filter

Export to Excel

If you are viewing a list of all active or inactive records, clicking the Export to Excel button creates an Excel file with a listing of the records currently shown in the grid. In a few seconds, the export file will appear on the taskbar. Double-click on the file to open.
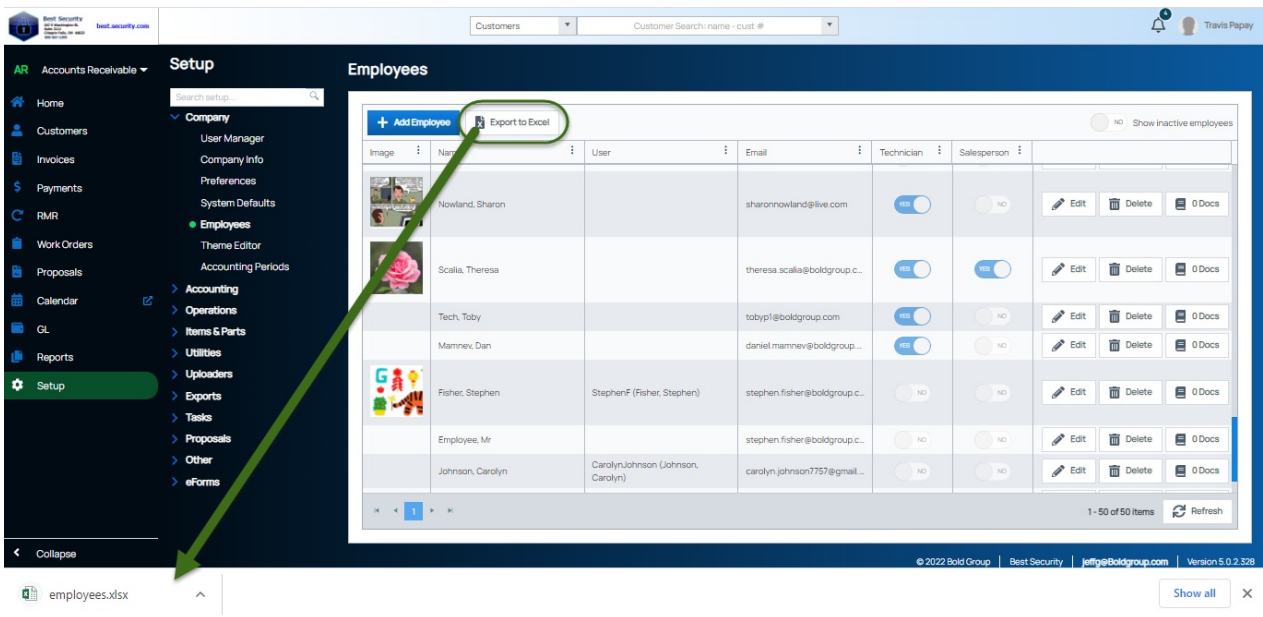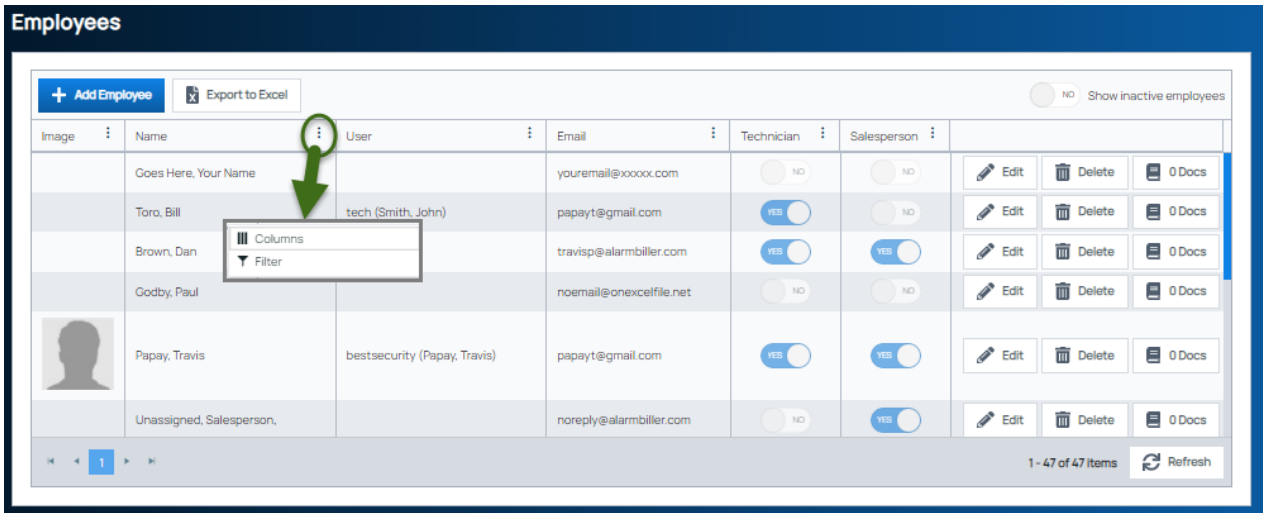

Filter by Active or Inactive

At the upper right of the list is a toggle button used to show active-only or Inactive-only records.
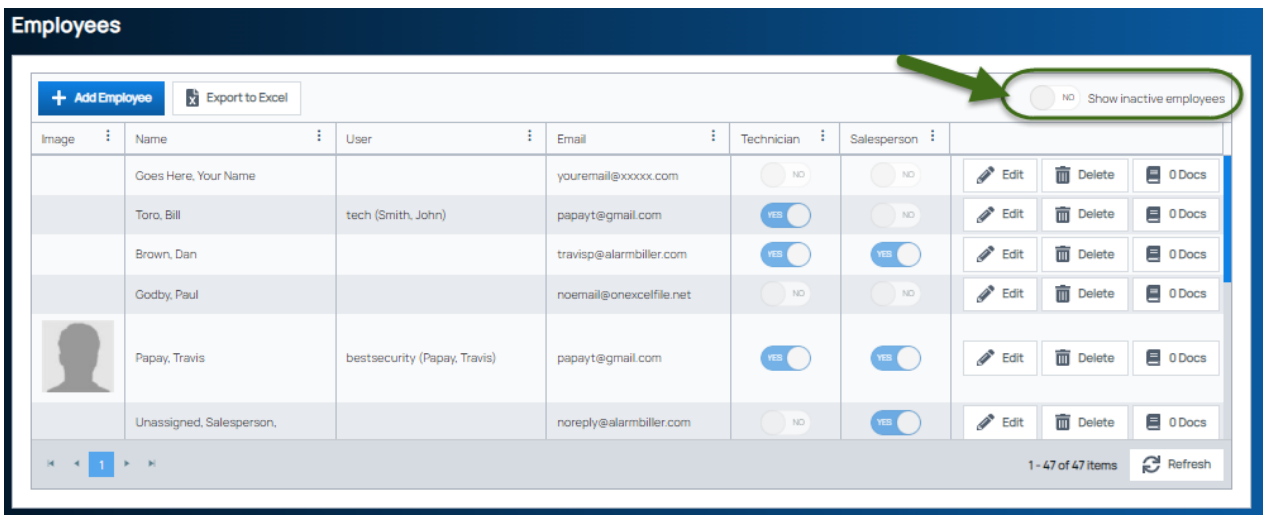

Column Options

Clicking the ellipse button to the right of any column header displays a list of two options: Columns and Filter.

Columns

When selecting this option, a list of all available columns is displayed. If you do not want certain columns displayed in the grid, clear the checkbox to the left of each field. Click the Apply button when finished.

Note: If you leave this page and return again, the columns will revert to the default view.
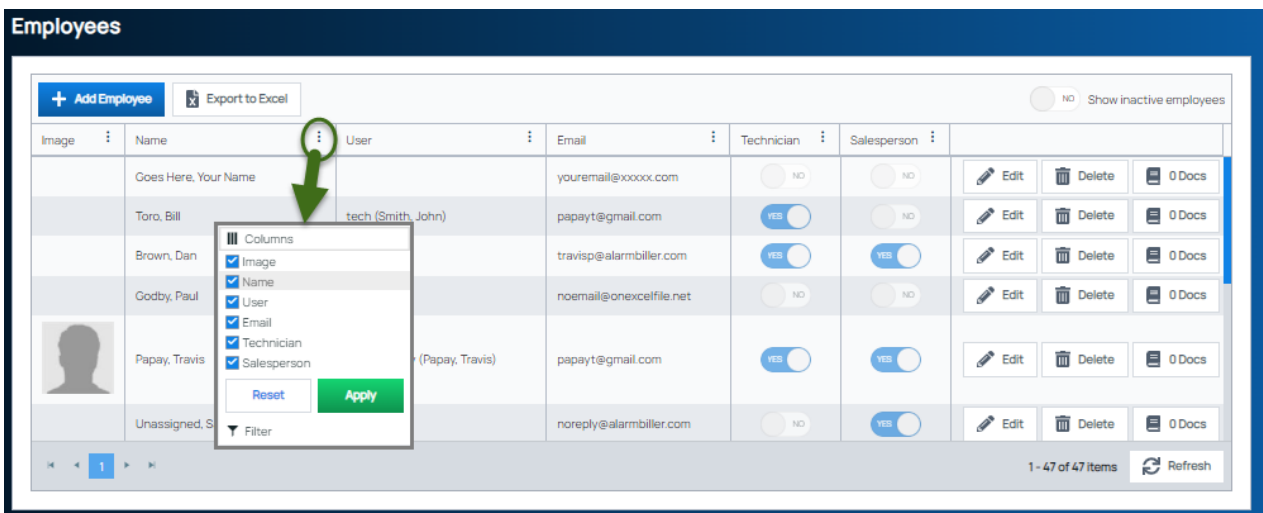
Filter

This option is used to refine the list displayed in the grid. When clicking on Filter, a dialog box is displayed for entering criteria to find the records you want to display. The first field contains a drop-down list from which to select an operator. The list of available operators are:

- Is equal to
- Is not equal to
- Contains
- Does not contain
- Starts with
- Ends with
- Is null

- Is not null

- Is empty

- Is not empty

Select the desired operator, and then enter the criteria in the field below. Click on Filter when finished. The list refreshes based on the filter criteria entered.

Note: If you leave this page and then return again, the columns will revert to the default view.